## **Online Expense Portal**

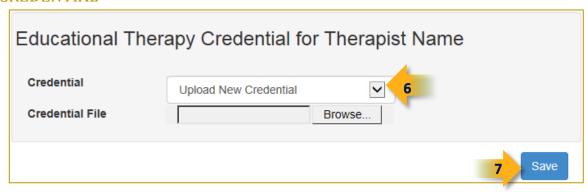
## QUICK REFERENCE GUIDE

## **EDUCATIONAL THERAPIES & SERVICES**



- 1) Enter the following information:
  - Payment Date: Select a date from the calendar, or type the date directly into the textbox
  - Payment Method: How the card was used
  - Vendor/Facility: Most likely the name of the service
  - Payment Total: The amount of the transaction, as shown on the receipt
  - Receipt File: Please note files cannot exceed 100MB and file names cannot include symbols ("\$#<>/)
  - Therapist: First and last name of the therapist
- 2) Select a Therapy Type from the drop-down menu
  - If the therapy is not listed on the menu, select Other
    - When Other is selected, an additional field is visible for typing the name of the therapy
- 3) Confirm that you have reviewed the therapist's credentials (you will be prompted to upload the credentials once the information on this screen is saved)
- 4) Select an Educational Therapy Credential Type from the drop-down menu
  - Items in this menu are determined based on the Therapy Type chosen above
  - If the credential type is not listed on the menu, select Other
    - When Other is selected, an additional field is visible for typing the name of the credential
- 5) Click Save to proceed

## **UPLOAD CREDENTIAL**



- 6) Click Browse to upload a picture or electronic copy of the therapist's credential
  - This button will read, **Choose Files**, for Chrome users
  - Previously-uploaded credentials populate in the **Credential** drop-down menu so that they can be selected in future expense reports
- 7) Click Save to save the expense entry and return to the Main Screen, where you can create additional expense entries, submit your expense report, or later modify this entry prior to submission.

**Note:** A new expense entry is required for each payment.